



**GENERAL SERVICES ADMINISTRATION SERVICES**  
**FEDERAL SUPPLY PROGRAM**  
**Authorized Federal Supply Schedule Price List**  
**Industrial Group 520**

**Schedule Title:** Financial and Business Solutions (FABS)

**Contract Number:** GS-23F-8132H

**Contract Period:** February 8, 2013 – March 4, 2018

**Contractor:** *Deloitte & Touche LLP*  
*1919 N. Lynn Street*  
*Arlington, VA 22209*

[www.deloitte.com](http://www.deloitte.com)

**Contact for Contract Administration Contact & Ordering:**  
Kimberly Gibson, Senior Contracts Manager  
Deloitte & Touche LLP  
1919 N. Lynn Street  
Arlington, VA 22209  
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Email: [usdeloittegsacontracts@deloitte.com](mailto:usdeloittegsacontracts@deloitte.com)

**Business Size:** Large

*Prices shown herein are Net (Discount deducted)*  
*Pricelist is current through Modification PA-0050 dated 6-22-2016 and*  
*Mass Mod CM-A514 - Schedule 520 Terms and Conditions Update dated*  
*4-18-16*

For more information on ordering from Federal Supply schedules click on the FSS Schedules button at <http://fss.gsa.gov>. On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order is available through **GSA Advantage!<sup>TM</sup>**, a menu-driven database system. The INTERNET address for **GSA Advantage!<sup>TM</sup>** is: <http://www.gsaadvantage.gov>.

***Federal Supply Service***  
**Authorized Federal Supply Schedule Price List**

**CUSTOMER INFORMATION**

1a.	Awarded Special Item Number(s)	520-1, 520-1(RC); 520-2, 520-2(RC); 520-5, 520-5(RC); 520-7, 520-7(RC); 520-8, 520-8(RC); 520-11, 520-11(RC); 520-12, 520-12(RC); 520-13, 520-13(RC)
	See Descriptions See Pricing Schedule	Attached Attached
1b.	Lowest Unit Price	Pricing List
1c.	Labor Category Descriptions	Attached
2.	Maximum Order	\$1,000,000
3.	Minimum Order	\$100
4.	Geographic Coverage	Domestic
5.	Point(s) of Production	Arlington, Arlington County, VA
6.	Net Price Quantity Discount	See Statement on Pricing List
7.		
8.	Prompt Payment Terms	None
9a.	Government Credit Card below micro-purchase threshold	Yes
9b.	Government Credit Card above micro-purchase threshold	Not Accepted
10.	Foreign Items	N/A
11a.	Time of Delivery	Per Task Order
11b.	Expedited Delivery <i>Items available for expedited delivery are noted in this price list</i>	Per Task Order, Contact POC
11c.	Overnight and 2-day delivery	N/A

- 11d. Urgent Requirements See Cover Sheet POC  
*In accordance with clause I-FSS-140-B Deloitte & Touche LLP shall reply to any inquiry for accelerated delivery within 3 working days after receipt of inquiry. Any telephone inquiries or replies will be confirmed by Deloitte & Touche LLP in writing.*
12. F. o. b. Points Destination
- 13a. Ordering Address Kimberly Gibson,  
Senior Contract Manager  
1919 N. Lynn Street  
Arlington, VA 22209  
Email:  
[usdeloittegsacontracts@deloitte.com](mailto:usdeloittegsacontracts@deloitte.com)  
Phone: 703-251-1642  
Fax: 703-842-6748
- 13b. Ordering Procedures  
*For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA's), and a sample BPA can be found at the GSA/FSS Schedule homepage (<http://fss.gsa.gov/schedules>).*
14. Payment Address: Electronic Payment/Wire Transfer and ACH:  
Bank of America  
Account # 385015866213  
Swift# BOFAUS3N  
US ACH: 011900571  
US WIRE: 026009593
- Check Remittance Address:  
Deloitte & Touche LLP  
PO Box 844708  
Dallas, TX 75284-4708
- For Overnight Remittance Only:  
Deloitte & Touche LLP  
LBX# 844708  
1950 N. Stemmons Freeway  
Suite 5010  
Dallas, TX 75207
15. Warranty Provisions N/A
16. Export packaging charges N/A
17. Terms and conditions of Government Purchase card Acceptance N/A
18. Terms and conditions of rental, maintenance, and repair N/A

19.	Terms and conditions of installation	N/A
20.	Terms and conditions of repair parts	N/A
20a.	Terms and conditions for any other services	N/A
21.	List of service and distribution points	N/A
22.	List of Participating dealers	N/A
23.	Preventative maintenance	N/A
24a.	Special attributes such as environmental attributes	N/A
24b.	Section 508 compliance information available on Electronic and Information Technology (EIT) supplies and services.	N/A
25.	Data Universal Number System (DUNS) Number:	18-710-7958
26.	Central Contractor Registration (CCR) Notification	3CCJ5

## **WELCOME**

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*Deloitte & Touche LLP welcomes this opportunity to present to you our qualifications and price list for the General Services Administration Financial and Business Solutions Schedule.*

*The unique environment and varied constituency of government agencies present challenges to those who work in the Federal arena. Deloitte & Touche LLP understands your needs and is committed to providing services in a manner that assists you both financially and operationally. We believe that by maximizing the value of our professional relationships with our clients, we build a solid foundation based on partnership. Our pledge of value delivers tangible and measurable results.*

*Providing your organization with outstanding service requires a detailed understanding of your business. Deloitte & Touche LLP has the skills, resources, experience and commitment to assist Federal agencies and governmental entities in meeting the demanding requirements of today's Federal environment. We fully understand the challenges faced by organizations while accomplishing their missions and are committed to helping agencies achieve their operational and organizational improvement goals. We are aware of your need for timely, responsive service and pay close attention to the unique circumstances and concerns of each individual organization. Our competitive advantage is our carefully selected and trained professionals, who not only understand your mission and business imperatives, but also understand your organizational structure and management roles.*

*We look forward to meeting with you and discussing potential opportunities. Pursuant of our firm mission, "to be the professional services firm that consistently exceeds the expectations of our clients and our people," Deloitte & Touche LLP has the ability to offer you the highest quality service possible, in the most efficient manner.*

*Very truly yours,*

***Deloitte & Touche LLP***

## ***FIRM OVERVIEW***

Deloitte & Touche LLP is one of the nation's largest and most respected professional services firms providing a business mindset combined with deep technical knowledge and extensive industry experience to creatively address business issues across the full spectrum of accounting, financial instrument valuation, security and privacy, governance, process improvement, data analytics, risk advisory disciplines and other management consulting services.. Our clients number in the tens of thousands and range from Fortune 500 multinationals, to high-tech start-ups, to federal, state, and local government agencies, to not-for-profit charities and associations.

In both challenging and favorable economic conditions, organizations strive to be smart, nimble, creative and forward thinking. Deloitte brings a business mindset combined with deep technical knowledge and extensive industry experience to assist clients to address business issues across the broad spectrum of accounting, financial instrument valuation, security and privacy, governance, process improvement, data analytics and risk advisory disciplines.

Deloitte & Touche LLP professionals have a single focus: serving our clients and helping them solve their toughest problems. We work in eight key business areas — financial statement and internal control audit, financial accounting & reporting services, financial instrument valuation & securitization, finance operations & controls transformation, governance, regulatory & risk strategies, internal audit transformation, security & privacy, and M&A services — but our real strength comes from combining the talents of those groups to address clients' needs. *Fortune* and *BusinessWeek* consistently rank our organization among the best places to work, which is good news for our talent and our clients alike. When the best people tackle the most compelling challenges, everyone wins

Deloitte & Touche LLP is dedicated to helping our clients and people excel. Known as an employer of choice for innovative human resources programs. For more information, please visit our web site at [www.deloitte.com](http://www.deloitte.com).

## *SERVICES*

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### **SIN 520-1, 520-1(RC) ~ PROGRAM FINANCIAL ADVISOR**

Deloitte & Touche LLP has the requisite skill sets, technology and experience to provide agencies with the overall management and development of an asset sales program. The program financial advisor is responsible for developing a strategic view of the asset portfolio and provides advice and support on how to manage, package, present, various asset portfolios in such a way as to maximize the portfolio's value. Value added Program Financial Advisor's have to been forward thinking in order to identify critical issues and offer meaningful solutions relative to: loan portfolio analysis, securitizations, restructurings, mark-to-market portfolio valuations, budget and budget analysis, credit reform analysis, marketing activities, post sale analysis, and training.

In addition to any services listed above, Deloitte & Touche LLP has the skills to provide the following services: Asset sales, Develop, manage and/or implement an origination program, Trust fund management/institutional trust services/investment banking, Equity oversight and transaction administration.

### **SIN 520-2, 520-2(RC) ~ TRANSACTION SPECIALIST**

Deloitte & Touche LLP is uniquely qualified and positioned to provide asset sale advisory services related to the valuation and disposition of various assets, any resulting asset sales structure, pricing, and bid acceptance. These services may include, but are not limited to the following: valuation of assets; developing sales strategies; pre-sale support; review of pending sale; budgeting and budget analysis; credit reform analysis; marketing and sale support, and; training.

### **SIN 520-5, 520-5(RC) ~ LOAN SERVICING AND ASSET MANAGEMENT**

The assets of an organization, monetary, personnel, or physical, make up a major portion of that organization's resource investment. The management of those assets to ensure their efficient and effective utilization is a critical factor in an organization's success. Deloitte & Touche LLP applies our proven methodologies and experienced personnel to assist organizations in minimizing risk through effective analysis and design of asset management systems. In addition, we conduct specialized reviews to assess adequacy of controls and policies and procedures, assess agency compliance with asset management related requirements, resolve audit recommendations and assist management in implementing corrective actions, and perform special analysis and evaluations.

As mentioned in the introduction above Deloitte & Touche LLP is experienced in providing loan servicing and asset management services needed to service, monitor, and maintain government held loans/assets; refinance government-held loans/assets; avert defaults; share and manage risk on serviced loans/assets; and/or service and monitor loans and other asset guarantees. This may include but is not limited to the following;

- Assist in assessment and improvement of current asset management processes related to cash management, inventory management, Government property, plant and equipment, loan servicing practices, and review of opinions on financing and refinancing
- Verify and maintain borrower data
- Exchange data with an agency's central database and reconcile information
- Issue forms, disclosures, letters, and other materials
- Cancel loans
- Convert loans to repayment status
- Calculate interest; Assess and post fees and late charges
- Bill the borrower; Process borrower remittances
- Process borrower requests for remittances via pre-authorized debit

- Determine income contingent repayment (ICR)
- Prepare annual statements
- Reconvert loans
- Loan consolidation and transfer
- Transfer defaulted loans
- Accept and service loans from another service or DCS
- Perform skip tracing and transmit information to an agency's central database
- Report to credit bureaus
- Provide customer service
- Reconcile with an agency's central database
- Refinance Government-held loans
- Enforce creditor's rights under the loan
- Protect loan collateral
- Share and manage credit risk
- Workout or restructure troubled loans.

## SIN 520-7, 520-7(RC) ~ FINANCIAL & PERFORMANCE AUDITS

Deloitte & Touche LLP provides financial auditing services, giving an attestation of whether the financial statements of an audited entity present fairly the financial position, results of operations, and cash flows in conformity with generally accepted accounting principles. Services may include but are not limited to the following: Financial statement audits; Segments of financial statements; internal controls, Compliance with laws and regulations, Economy and efficiency audits, Program results and program fraud audits.

**Financial Audits.** Deloitte & Touche LLP is experienced in advising and assisting agencies in the preparation of annual CFO Act reports, performance audits and audits of annual financial statements. We have assisted agency OIG and CFO personnel in analyzing and compiling data for use in preparing financial statements and related disclosures in accordance with the CFO Act of 1990, Government Auditing Standards, Government Performance and Results Act of 1993 (GPRA), Government Management Reform Act of 1994 (GMRA), Federal Manager's Financial Integrity Act of 1982 (FMFIA), Federal Financial Management Improvement Act of 1996 and various OMB Circulars and Bulletins.

**Financial Related Audits.** Financial related audits require the performance of procedures used to determine whether presentation of specific financial information complies with stated criteria; whether specific financial compliance requirements are being adhered to; or whether the organization's internal control structure is suitably designed and functioning so as to achieve stated control objectives. In addition to financial compliance, often other laws and regulations are applicable to an organization, which are not specifically financial in nature, but with which noncompliance could have an impact on the financial statements.

Deloitte & Touche LLP performs a wide range of such engagements, including attestations of management's assertions with respect to the internal controls of an organization in connection with a financial statement audit or separately; audits of specified elements of an organization's or accounts financial statements; tests of grants procedures; tests of grant expenditures in accordance with the terms of the grant and other applicable guidelines such as FAR; evaluation of internal controls over financial reporting, including manual monitoring and reconciliation controls as well as general computer and application controls over EDP processing; and a variety of engagements to examine compliance with applicable laws and regulations.

**Performance Audits.** Deloitte & Touche LLP is experienced in conducting organizational effectiveness, efficiency, economy of effort and value for money reviews. We approach evaluations, reviews, assessments, management and performance audits with the intent of being an aid to management through delivering credible, timely and realistic solutions to their issues. It is typically easy to identify areas of inefficiency, but it



is more difficult to develop realistic recommendations. Our experience with all aspects of governmental entities enables us to address client problems and needs from a comprehensive perspective, taking into account the functioning of the organizations as a whole. It is because of our thorough in-depth understanding of the Federal environment that we have the capability to assist governmental entities in achieving operational and organizational improvement goals.

## **SIN 520-8, 520-8(RC) ~ COMPLEMENTARY AUDIT SERVICES**

Deloitte & Touche LLP provides a number of additional financial analysis and auditing services including, but not limited to: desk reviews, fraud audits, benefit plan audits, quality control reviews, reviews of adjusted community rate proposals, economy and efficiency audits, IPA reviews, financial and budget analysis, EDP/ADP audits, SAS-70 reviews, reviews of internal controls and statistical sampling applications, Assist in development of questions for use at hearings, Develop methods and approaches to be applied in evaluating a new or a proposed program, Forecast potential program outcomes under various assumptions, and Perform peer reviews

## **SIN 520-11, 520-11(RC) ~ ACCOUNTING**

Deloitte & Touche LLP offers a line of financial operations, accounting and reporting services through our Deloitte & Touche Outsourcing (DTO) national practice. DTO provides a variety of record keeping, account processing, data-management and management reporting services on an outsourced basis, in concert with value-added co sourcing services including internal audit, business process review and reengineering to clients in all market segments.

In addition Deloitte & Touche LLP also provides the following services: Analyze, process, and summarize transactions, Assist in devising new or revised accounting policies and procedures, Classify accounting transactions, Perform special studies to improve accounting operations, Resolve accounting issues, Resolve and/or implement audit findings, Assess or enhance accounting internal controls, Improve operating efficiency and effectiveness

## **SIN 520-12, 520-12(RC) ~ BUDGETING**

Since the budget process is, in fact, a cycle, with the two components overlapping (albeit for different fiscal years), streamlining and improvements are complex to implement. This is particularly true with information systems that are often times called upon to serve more than just a budgeting function (for example, financial reporting, accounting); modifications must be previewed and screened for their applicability to all functions. Deloitte & Touche LLP enables agencies to integrate their budget and management planning processes by developing work flow and organization analyses by activity and/or process (i.e., purchasing, acquisition, financial reporting). Comparing these analyses with our best practices knowledge network enables us to assist agencies in determining the most efficient and cost effective processes to implement, including among other things, reducing layers of management, eliminating hand-offs, eliminating reports and supervisory reviews. Identified requirements (for example, the degree of competition required for the estimated value of service or product being purchased, performance measurements, etc.) of the organization are incorporated into the analyses to ensure that recommendations are feasible and fit into the long-term strategy of the agency as well as any regular performance reviews.

Deloitte & Touche LLP Budgeting services includes by is not limited to the following: Assess and improve the budget formulation process, Assess and improve the budget execution process, Conduct special reviews of budget formulation or execution issues, Review budgetary controls, Assist with implementation of corrective actions

## SIN 520-13, 520-13(RC) ~ COMPLEMENTARY FINANCIAL MANAGEMENT SERVICES

Deloitte & Touche LLP is experienced in providing complementary financial management services as stated in the descriptions below for Financial Management Systems Services, Financial Reporting and Analysis services, Financial Planning and Performance Measurement Services and Other Financial Management services. Services provided include but is not limited to the following: Assess and improve financial management systems, Conduct A-127 system compliance reviews, Assist with implementation of corrective actions, Document systems, Identify systems requirements, Plan and develop systems, Assist in meeting agency financial management system requirements, Assess and improve financial reporting and analysis, Develop new reporting formats and pro-forma financial reports, Assist in improving and streamlining reporting and analysis processes, Perform cost-benefit or other special financial analyses, Assist with the requirements of the Government Performance & Results Act

**Financial Management Systems Services.** Deloitte & Touche LLP has a major commitment to provide a wide range of control assurance services in support of our clients' financial management systems. We approach elements of those systems, such as information security and control, as business issues with major technical aspects. As the leader in Information Security Consulting, we understand security requirements in large-scale multi-platform, networked computing environments. We have helped our clients define and implement business-based information security architectures that parallel and support their technical architectures. We bring a strong implementation-orientation to all our work. Our recommendations are pragmatic and workable. We have the technical resources and experience to implement our recommendations and at the same time assist agencies in gaining efficiencies. Our efforts, "thought leadership" and nationally eminent professionals have been recognized throughout the industry. Business continuity is the uninterrupted availability of all of the resources necessary to operate your enterprise at a level acceptable to senior management. The object of continuity planning is to assist organizations in the preservation of their businesses by concentrating on the business process.

**Financial Reporting and Analysis Services.** We perform market and competitive analysis, cost determinations, lost profit analysis, economic studies, statistical analysis, and industry review in a variety of business situations. We apply our insight and creativity in developing credible damage theories and models appropriate to the issues of each case and useful in critiquing the adversary's position. When appropriate, we work with other professionals from our firm in the valuation, accounting, actuarial, compensation, solutions and government contracting practices, to provide specific technical support.

**Financial Planning and Performance Measurement Services.** Performance measurement is one of many critical tools to help an organization continually improve. It is, in essence, a means to an end. Peter Drucker, the eminent management theorist, has been frequently quoted as saying that "we manage what we measure." The inherent value of performance measurement is the commitment and accountability it creates on the part of management to strive for desired outcomes of the organization.

We view performance measurement as a critical tool necessary to the effective management of government services. The information generated from a performance measurement system is used in three key administrative functions that are common to all governments - *planning, budgeting and management*. Properly implemented, performance measures significantly enhance an organization's ability to perform these functions.

**Other Financial Management Services.** The specialists of Deloitte & Touche LLP Government Contracting and Federal Assurance Services Groups understand Federal agencies' needs and can help provide stability in this turbulent world of government contracting and grants management. Our team includes accountants, attorneys, and consultants with broad experience in developing, interpreting, and helping agencies enforce and companies comply with government regulations and standards. Their diverse backgrounds include serving with the Defense Contract Audit Agency, other government agencies, and within industry. Their sound advice and targeted assistance can provide a unique insight into the dynamic world of Federal procurement. Specific



areas of expertise include Quality Assurance/Quality Control, cost and controls review, risk assessments, benchmarking activities and rate proposal reviews.

***LABOR CATEGORIES***

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**Education Substitutions:**

H.S. Diploma + 4 years additional experience	Equals	Bachelor's Degrees
Associate Degree + 1 years additional experience	Equals	Bachelor's Degrees
Bachelor's Degree + 2 years additional experience	Equals	Master's Degree
Master's Degree + 4 years additional experience	Equals	Ph.D.

**Experience Substitutions :**

A Ph.D may be substituted for 4 years of required experience with a Masters Degree or 6 years with a Bachelors Degree
A Masters Degree may be substituted for 2 years of required experience with a Bachelors Degree
A Bachelors Degree may be substituted for 4 years of required experience with a High School Diploma
An Associates Degree may be substituted for 3 years of required experience with a High School Diploma

**Financial Processing Services (SIN 520-1 & 520-2)**

- **Partner/ Director III**

**Minimum Education:** Bachelors Degree or Equivalent.

**Minimum Experience:** 10 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- **Partner/ Director II**

**Minimum Education:** Bachelors Degree or Equivalent.

**Minimum Experience:** 9 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- **Partner/ Director I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 8 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- **Project Director III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 7 years of applicable financial or business consulting experience, including 2 years of management experience

**Functional Responsibility:** Performs day-to-day management of overall contract support operations. Manages and coordinates the planning and production of all contract support activities. Has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Project Director II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 6 years of applicable financial or business consulting experience, including substantial experience in project management. 2 years of management experience.

**Functional Responsibility:** Performs day-to-day management of overall contract support operations. Manages and coordinates the planning and production of all contract support activities. Has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Project Director I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 6 years of applicable financial or business consulting experience, including substantial experience in project management. 1 year of management experience.

**Functional Responsibility:** Performs day-to-day management of overall contract support operations. Manages and coordinates the planning and production of all contract support activities. Has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Deputy Project Manager III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 5 years of applicable financial or business consulting experience, including substantial experience in project management. 2 years of management experience

**Functional Responsibility:** Assists Project Director is performing day-to-day management of overall contract support operations. Assists Project Director in managing and coordinating the planning and production of all contract support activities. Subject to Project Director approval, has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Deputy Project Manager II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience, including substantial experience in project management. 2 years of management experience

**Functional Responsibility:** Assists Project Director is performing day-to-day management of overall contract support operations. Assists Project Director in managing and coordinating the planning and production of all contract support activities. Subject to Project Director approval, has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Deputy Project Manager I**

**Minimum Education:** Bachelors or Equivalent

**Minimum Experience:** 4 years of applicable financial or business consulting experience, including substantial experience in project management. 1 year of management experience

**Functional Responsibility:** Assists Project Director is performing day-to-day management of overall contract support operations. Assists Project Director in managing and coordinating the planning and production of all contract support activities. Subject to Project Director approval, has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Senior Professional III**

**Minimum Education:** Paraprofessional certificate or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience.

**Functional Responsibility:** Directs and supervises junior professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

- **Senior Professional II**

**Minimum Education:** Paraprofessional certificate or Equivalent..

**Minimum Experience:** 3 years of applicable financial or business consulting experience.

**Functional Responsibility:** Directs and supervises junior professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel

- **Senior Professional I**

**Minimum Education:** Paraprofessional certificate or Equivalent..

**Minimum Experience:** 2 years of applicable financial or business consulting experience.

**Functional Responsibility:** Directs and supervises junior professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel

- **Junior Professional IV**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 2 years of applicable experience.

**Functional Responsibility:** Reports directly to Senior Professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

- **Junior Professional III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 1 year of applicable experience.

**Functional Responsibility:** Reports directly to Senior Professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

- **Junior Professional II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** None

**Functional Responsibility:** Reports directly to Senior Professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

- **Junior Professional I**

**Minimum Education:** High School.

**Minimum Experience:** None

**Functional Responsibility:** Reports directly to Senior Professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

### **Auditing Services (SIN 520-7 & 520-8)**

- **Partner/ Director III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 10 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- **Partner/ Director II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 9 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- **Partner/ Director I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 8 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.



**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- **Senior Manager III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 7 years of applicable financial or business consulting experience, including 2 years of management experience.

**Functional Responsibility:** Assigns work tasks to team members. Develops, maintains and monitors sub-task work plans. Performs first-line issue resolution. Provides updates on engagement progress and helps draft final report. Conducts on-site quality control inspections. Reviews and approves all milestone documentation.

- **Senior Manager II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 6 years of applicable financial or business consulting experience, including 2 years of management experience.

**Functional Responsibility:** Assigns work tasks to team members. Develops, maintains and monitors sub-task work plans. Performs first-line issue resolution. Provides updates on engagement progress and helps draft final report. Conducts on-site quality control inspections. Reviews and approves all milestone documentation.

- **Senior Manager I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 6 years of applicable financial or business consulting experience, including 1 year of management experience.

**Functional Responsibility:** Assigns work tasks to team members. Develops, maintains and monitors sub-task work plans. Performs first-line issue resolution. Provides updates on engagement progress to helps draft final report. Conducts on-site quality control inspections. Reviews and approves all milestone documentation.

- **Manager III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 5 years of applicable financial or business consulting experience, including 2 years of management experience.

**Functional Responsibility:** Reviews all documentation prepared by more junior personnel and is responsible for initial drafting of final project reports prior to submission for approval. Assumes responsibility for coordination of subordinate activities. Monitors project performance and staff relationships. Conducts performance reviews of other less experienced staff. Corrects errors identified during acceptance process.

- **Manager II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience, including 2 years of management experience.

**Functional Responsibility:** Reviews all documentation prepared by more junior personnel and is responsible for initial drafting of final project reports prior to submission for approval. Assumes responsibility for coordination of subordinate activities. Monitors project performance and staff relationships. Conducts performance reviews of other less experienced staff. Corrects errors identified during acceptance process

- **Manager I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience, including 1 year of management experience.

**Functional Responsibility:** Reviews all documentation prepared by more junior personnel and is responsible for initial drafting of final project reports prior to submission for approval. Assumes responsibility for coordination of subordinate activities. Monitors project performance and staff relationships. Conducts performance reviews of other less experienced staff. Corrects errors identified during acceptance process

- **Senior Staff III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 year of applicable financial or business consulting experience

**Functional Responsibility:** Analyzes and develops client solutions with team. Prepares documentation, reports and other deliverables for client approval. Assigns specific work tasks to more junior staff. Participates in planning of engagement and is responsible for all tasks delegated by Managers. Supports team in implementation and acceptance process. Ensures that deliverables are in compliance with statement of work.

- **Senior Staff II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 3 year of applicable financial or business consulting experience

**Functional Responsibility:** Analyzes and develops client solutions with team. Prepares documentation, reports and other deliverables for client approval. Assigns specific work tasks to more junior staff. Participates in planning of engagement and is responsible for all tasks delegated by Managers. Supports team in implementation and acceptance process. Ensures that deliverables are in compliance with statement of work.

- **Senior Staff I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 2 year of applicable financial or business consulting experience

**Functional Responsibility:** Analyzes and develops client solutions with team. Prepares documentation, reports and other deliverables for client approval. Assigns specific work tasks to more junior staff. Participates in planning of engagement and is responsible for all tasks delegated by Managers. Supports team in implementation and acceptance process. Ensures that deliverables are in compliance with statement of work.

- **Junior Staff IV**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 2 year of applicable financial or business consulting experience

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

- **Junior Staff III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 1 year of applicable financial or business consulting experience

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

- **Junior Staff II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** None

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

- **Junior Staff I**

**Minimum Education:** High School.

**Minimum Experience:** None

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

## **Accounting Services (520-11)**

- **Partner/ Director III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 10 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- **Partner/ Director II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 9 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards

- **Partner/ Director I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 8 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application

of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards

- **Senior Manager III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 7 years of applicable financial or business consulting experience, including 2 years of management experience.

**Functional Responsibility:** Assigns work tasks to team members. Develops, maintains and monitors sub-task work plans. Performs first-line issue resolution. Provides updates on engagement progress and helps draft final report. Conducts on-site quality control inspections. Reviews and approves all milestone documentation.

- **Senior Manager II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 6 years of applicable financial or business consulting experience, including 2 years of management experience.

**Functional Responsibility:** Assigns work tasks to team members. Develops, maintains and monitors sub-task work plans. Performs first-line issue resolution. Provides updates on engagement progress and helps draft final report. Conducts on-site quality control inspections. Reviews and approves all milestone documentation

- **Senior Manager I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 6 years of applicable financial or business consulting experience, including 1 year of management experience.

**Functional Responsibility:** Assigns work tasks to team members. Develops, maintains and monitors sub-task work plans. Performs first-line issue resolution. Provides updates on engagement progress and helps draft final report. Conducts on-site quality control inspections. Reviews and approves all milestone documentation

- **Manager III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 5 years of applicable financial or business consulting experience, including 2 years of management experience.

**Functional Responsibility:** Reviews all documentation prepared by more junior personnel and is responsible for initial drafting of final project reports prior to submission for approval. Assumes responsibility for coordination of subordinate activities. Monitors project performance and staff relationships. Conducts performance reviews of other less experienced staff. Corrects errors identified during acceptance process.

- **Manager II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience, including 2 years of management experience.

**Functional Responsibility:** Reviews all documentation prepared by more junior personnel and is responsible for initial drafting of final project reports prior to submission for approval. Assumes responsibility for coordination of subordinate activities. Monitors project performance and staff relationships. Conducts performance reviews of other less experienced staff. Corrects errors identified during acceptance process.

- **Manager I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience, including 1 year of management experience.

**Functional Responsibility:** Reviews all documentation prepared by more junior personnel and is responsible for initial drafting of final project reports prior to submission for approval. Assumes responsibility for coordination of subordinate activities. Monitors project performance and staff relationships. Conducts performance reviews of other less experienced staff. Corrects errors identified during acceptance process.

- **Senior Staff III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 year of applicable financial or business consulting experience

**Functional Responsibility:** Analyzes and develops client solutions with team. Prepares documentation, reports and other deliverables for client approval. Assigns specific work tasks to more junior staff. Participates in planning of engagement and is responsible for all tasks delegated by Managers. Supports team in implementation and acceptance process. Ensures that deliverables are in compliance with statement of work.

- **Senior Staff II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 3 years of applicable financial or business consulting experience.

**Functional Responsibility:** Analyzes and develops client solutions with team. Prepares documentation, reports and other deliverables for client approval. Assigns specific work tasks to more junior staff. Participates in planning of engagement and is responsible for all tasks delegated by Managers. Supports team in implementation and acceptance process. Ensures that deliverables are in compliance with statement of work.

- **Senior Staff I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 2 years of applicable financial or business consulting experience.

**Functional Responsibility:** Analyzes and develops client solutions with team. Prepares documentation, reports and other deliverables for client approval. Assigns specific work tasks to more junior staff. Participates in planning of engagement and is responsible for all tasks delegated by Managers. Supports team in implementation and acceptance process. Ensures that deliverables are in compliance with statement of work.

- **Junior Staff IV**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 2 years of applicable financial or business consulting experience.

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

- **Junior Staff III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 1 year of applicable financial or business consulting experience.

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

- **Junior Staff II**

**Minimum Education:** Bachelors or Equivalent..

**Minimum Experience:** None

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

- **Junior Staff I**

**Minimum Experience:** High School.

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

### **Financial Management Services (SIN 520-5)**

- **Partner/ Director III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 10 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- **Partner/ Director II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 9 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- **Partner/ Director I**

**Minimum Education:** Bachelors or Equivalent..

**Minimum Experience:** 8 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.



**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- **Senior Manager III**

**Minimum Education:** Bachelors Degree or Equivalent.

**Minimum Experience:** 7 years of applicable financial or business consulting experience, including substantial experience in project management. 2 years of management experience.

**Functional Responsibility:** Performs day-to-day management of overall contract support operations. Manages and coordinates the planning and production of all contract support activities. Has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Senior Manager II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 6 years of applicable financial or business consulting experience, including substantial experience in project management. 2 years of management experience.

**Functional Responsibility:** Performs day-to-day management of overall contract support operations. Manages and coordinates the planning and production of all contract support activities. Has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Senior Manager I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 6 years of applicable financial or business consulting experience, substantial experience in project management. 1 year of management experience.

**Functional Responsibility:** Performs day-to-day management of overall contract support operations. Manages and coordinates the planning and production of all contract support activities. Has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Manager III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 5 years of applicable financial or business consulting experience, including experience in project management. 2 years of management experience.

**Functional Responsibility:** Assists Project Director in managing and coordinating the planning and production of all contract support activities. Subject to Project Director's approval, has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Manager II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience, including experience in project management. 2 years of management experience.

**Functional Responsibility:** Assists Project Director in managing and coordinating the planning and production of all contract support activities. Subject to Project Director's approval, has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Manager I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience, including experience in project management. 1 year of management experience.

**Functional Responsibility:** Assists Project Director in managing and coordinating the planning and production of all contract support activities. Subject to Project Director's approval, has authority and responsibility to identify and commit resources required to support effort. Crafts and enforces quality control programs.

- **Senior Staff III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience

**Functional Responsibility:** Directs and supervises junior professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

- **Senior Staff II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 3 years of applicable financial or business consulting experience

**Functional Responsibility:** Directs and supervises junior professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

- **Senior Staff I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 2 years of applicable financial or business consulting experience

**Functional Responsibility:** Directs and supervises junior professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

- **Junior Staff IV**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 2 years of applicable financial or business consulting experience

**Functional Responsibility:** Reports directly to Senior Professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

- **Junior Staff III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 1 year of applicable financial or business consulting experience.

**Functional Responsibility:** Reports directly to Senior Professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

- **Junior Staff II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** None

**Functional Responsibility:** Reports directly to Senior Professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

- **Junior Staff I**

**Minimum Education:** High School.

**Minimum Experience:** None

**Functional Responsibility:** Reports directly to Senior Professional. Assists in drafting and preparing project documentation. Prepares readable documents to be used by project personnel.

## Financial Management Services (SIN 520-12 & 520-13)

- Partner/ Director III

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 10 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- Partner/ Director II

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 9 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- Partner/ Director I

**Minimum Education:** Bachelors or Equivalent..

**Minimum Experience:** 8 years of applicable financial or business consulting experience, including substantial experience in managing the business associated with client requirements.

**Functional Responsibility:** Organizes and directs overall engagement performance. Ensures that goals and objectives are accomplished within prescribed timeframe and funding parameters. Negotiates and makes decisions for the firm. Participates in project status committee meetings to resolve issues through application of Firm resources or experience gained in other projects. Ensures compliance with Firm policies and professional standards.

- Senior Manager III

**Minimum Education:** Bachelors Degree or Equivalent.

**Minimum Experience:** 7 years of applicable financial or business consulting experience, including substantial experience in project management. 2 years of management experience.

**Functional Responsibility:** Assigns work tasks to team members. Develops, maintains and monitors sub-task work plans. Performs first-line issue resolution. Provides updates on engagement progress and helps draft final report. Conducts on-site quality control inspections. Reviews and approves all milestone documentation.

- **Senior Manager II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 6 years of applicable financial or business consulting experience, including substantial experience in project management. 2 years of management experience.

**Functional Responsibility:** Assigns work tasks to team members. Develops, maintains and monitors sub-task work plans. Performs first-line issue resolution. Provides updates on engagement progress and helps draft final report. Conducts on-site quality control inspections. Reviews and approves all milestone documentation.

- **Senior Manager I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 6 years of applicable financial or business consulting experience, substantial experience in project management. 1 year of management experience.

**Functional Responsibility:** Assigns work tasks to team members. Develops, maintains and monitors sub-task work plans. Performs first-line issue resolution. Provides updates on engagement progress and helps draft final report. Conducts on-site quality control inspections. Reviews and approves all milestone documentation

- **Manager III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 5 years of applicable financial or business consulting experience, including experience in project management. 2 years of management experience.

**Functional Responsibility:** Reviews all documentation prepared by more junior personnel and is responsible for initial drafting of final project reports prior to submission for approval. Assumes responsibility for coordination of subordinate activities. Monitors project performance and staff relationships. Conducts performance reviews of other less experienced staff. Corrects errors identified during acceptance process.

- **Manager II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience, including experience in project management. 2 years of management experience.

**Functional Responsibility:** Reviews all documentation prepared by more junior personnel and is responsible for initial drafting of final project reports prior to submission for approval. Assumes responsibility for coordination of subordinate activities. Monitors project performance and staff relationships. Conducts performance reviews of other less experienced staff. Corrects errors identified during acceptance process

- **Manager I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience, including experience in project management. 1 year of management experience.

**Functional Responsibility:** Reviews all documentation prepared by more junior personnel and is responsible for initial drafting of final project reports prior to submission for approval. Assumes responsibility for coordination of subordinate activities. Monitors project performance and staff relationships. Conducts performance reviews of other less experienced staff. Corrects errors identified during acceptance process

- **Senior Staff III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 4 years of applicable financial or business consulting experience

**Functional Responsibility:** Analyzes and develops client solutions with team. Prepares documentation, reports and other deliverables for client approval. Assigns specific work tasks to more junior staff. Participates in planning of engagement and is responsible for all tasks delegated by Managers. Supports team in implementation and acceptance process. Ensures that deliverables are in compliance with statement of work.

- **Senior Staff-II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 3 years of applicable financial or business consulting experience

**Functional Responsibility:** Analyzes and develops client solutions with team. Prepares documentation, reports and other deliverables for client approval. Assigns specific work tasks to more junior staff. Participates in planning of engagement and is responsible for all tasks delegated by Managers. Supports team in implementation and acceptance process. Ensures that deliverables are in compliance with statement of work.

- **Senior Staff I**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 2 years of applicable financial or business consulting experience

**Functional Responsibility:** Analyzes and develops client solutions with team. Prepares documentation, reports and other deliverables for client approval. Assigns specific work tasks to more junior staff. Participates in planning of engagement and is responsible for all tasks delegated by Managers. Supports team in implementation and acceptance process. Ensures that deliverables are in compliance with statement of work.

- **Junior Staff IV**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 2 years of applicable financial or business consulting experience

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

- **Junior Staff III**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** 1 year of applicable financial or business consulting experience.

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

- **Junior Staff II**

**Minimum Education:** Bachelors or Equivalent.

**Minimum Experience:** None

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

- **Junior Staff I**

**Minimum Education:** High School.

**Minimum Experience:** None

**Functional Responsibility:** Assists in drafting and preparing project deliverables. Supports team in implementation and acceptance process. Analyzes information and other project requirements. Develops required corrective or support actions. Assists manager in reporting and tracking of project costs and level of effort.

### **LABOR RATES**

(Includes 0.75% IFF), Escalation Factor = 2.50%.

SIN	Labor Category Name	Option III Year 3 GSA Price 3-5-15 to 3-4-16	Option III Year 4 GSA Price 3-5-16 to 3-4-17	Option III Year 5 GSA Price 3-5-13 to 3-4-18
520 1	Partner/Director III (520 1)	\$376.32	\$385.72	\$395.38
520 1	Partner/Director II (520 1)	\$365.20	\$374.33	\$383.68
520 1	Partner/Director I (520 1)	\$357.79	\$366.74	\$375.91
520 1	Project Director III (520 1)	\$347.73	\$356.42	\$365.33
520 1	Project Director II (520 1)	\$338.74	\$347.21	\$355.89
520 1	Project Director I (520 1)	\$330.28	\$338.53	\$346.99
520 1	Deputy Project Manager III (520 1)	\$319.15	\$327.13	\$335.31
520 1	Deputy Project Manager II (520 1)	\$309.10	\$316.83	\$324.75
520 1	Deputy Project Manager I (520 1)	\$303.80	\$311.40	\$319.17
520 1	Sr. Professional III (520 1)	\$238.17	\$244.12	\$250.23
520 1	Sr. Professional II (520 1)	\$230.77	\$236.53	\$242.45
520 1	Sr. Professional I (520 1)	\$225.46	\$231.10	\$236.88
520 1	Jr Professional IV (520 1)	\$214.36	\$219.72	\$225.21
520 1	Jr Professional III (520 1)	\$207.48	\$212.66	\$217.98
520 1	Jr Professional II (520 1)	\$203.24	\$208.32	\$213.53
520 1	Jr Professional I (520 1)	\$172.54	\$176.86	\$181.28
520 2	Partner/Director III (520 2)	\$376.32	\$385.72	\$395.38
520 2	Partner/Director II (520 2)	\$365.20	\$374.33	\$383.68
520 2	Partner/Director I (520 2)	\$357.79	\$366.74	\$375.91
520 2	Project Director III (520 2)	\$347.73	\$356.42	\$365.33
520 2	Project Director II (520 2)	\$338.74	\$347.21	\$355.89
520 2	Project Director I (520 2)	\$330.28	\$338.53	\$346.99
520 2	Deputy Project Manager III (520 2)	\$319.15	\$327.13	\$335.31
520 2	Deputy Project Manager II (520 2)	\$309.10	\$316.83	\$324.75
520 2	Deputy Project Manager I (520 2)	\$303.80	\$311.40	\$319.17
520 2	Sr. Professional III (520 2)	\$238.17	\$244.12	\$250.23
520 2	Sr. Professional II (520 2)	\$230.77	\$236.53	\$242.45
520 2	Sr. Professional I (520 2)	\$225.46	\$231.10	\$236.88
520 2	Jr Professional IV (520 2)	\$214.36	\$219.72	\$225.21
520 2	Jr Professional III (520 2)	\$207.48	\$212.66	\$217.98
520 2	Jr Professional II (520 2)	\$203.24	\$208.32	\$213.53
520 2	Jr Professional I (520 2)	\$172.54	\$176.86	\$181.28
520 5	Partner/Director III (520 5)	\$275.97	\$282.87	\$289.93
520 5	Partner/Director II (520 5)	\$266.76	\$273.43	\$280.26
520 5	Partner/Director I (520 5)	\$262.53	\$269.09	\$275.82
520 5	Senior Manager III (520 5)	\$255.01	\$261.38	\$267.92
520 5	Senior Manager II (520 5)	\$247.71	\$253.89	\$260.24
520 5	Senior Manager I (520 5)	\$241.35	\$247.39	\$253.57
520 5	Manager III (520 5)	\$234.05	\$239.90	\$245.89
520 5	Manager II (520 5)	\$227.58	\$233.27	\$239.10
520 5	Manager I (520 5)	\$221.23	\$226.76	\$232.43



SIN	Labor Category Name	Option III Year 3 GSA Price 3-5-15 to 3-4-16	Option III Year 4 GSA Price 3-5-16 to 3-4-17	Option III Year 5 GSA Price 3-5-13 to 3-4-18
520 5	Sr. Staff III (520 5)	\$195.63	\$200.51	\$205.52
520 5	Sr. Staff II (520 5)	\$189.48	\$194.22	\$199.07
520 5	Sr. Staff I (520 5)	\$185.24	\$189.87	\$194.62
520 5	Jr Staff IV (520 5)	\$157.20	\$161.13	\$165.16
520 5	Jr Staff III (520 5)	\$152.43	\$156.24	\$160.15
520 5	Jr Staff II (520 5)	\$149.25	\$152.98	\$156.81
520 5	Jr Staff I (520 5)	\$125.96	\$129.12	\$132.34
520 11	Partner/Director III (520 11)	\$275.97	\$282.87	\$289.93
520 11	Partner/Director II (520 11)	\$266.76	\$273.43	\$280.26
520 11	Partner/Director I (520 11)	\$262.53	\$269.09	\$275.82
520 11	Sr. Manager III (520 11)	\$255.01	\$261.38	\$267.92
520 11	Sr Manager II (520 11)	\$247.71	\$253.91	\$260.24
520 11	Sr Manager I (520 11)	\$241.35	\$247.39	\$253.57
520 11	Manager III (520 11)	\$234.05	\$239.90	\$245.89
520 11	Manager II (520 11)	\$227.58	\$233.27	\$239.10
520 11	Manager I (520 11)	\$221.23	\$226.76	\$232.43
520 11	Sr. Staff III (520 11)	\$195.63	\$200.51	\$205.52
520 11	Sr. Staff II (520 11)	\$189.48	\$194.22	\$199.07
520 11	Sr. Staff I (520 11)	\$185.24	\$189.87	\$194.62
520 11	Jr Staff IV (520 11)	\$157.20	\$161.13	\$165.16
520 11	Jr Staff III (520 11)	\$152.43	\$156.24	\$160.15
520 11	Jr Staff II (520 11)	\$149.25	\$152.98	\$156.81
520 11	Jr Staff I (520 11)	\$125.96	\$129.12	\$132.34
520 12	Partner/Director III (520 12)	\$275.97	\$282.87	\$289.93
520 12	Partner/Director II (520 12)	\$266.76	\$273.43	\$280.26
520 12	Partner/Director I (520 12)	\$262.53	\$269.09	\$275.82
520 12	Sr. Manager III (520 12)	\$255.01	\$261.38	\$267.92
520 12	Sr Manager II (520 12)	\$247.71	\$253.89	\$260.24
520 12	Sr Manager I (520 12)	\$241.35	\$247.39	\$253.57
520 12	Manager III (520 12)	\$234.05	\$239.90	\$245.89
520 12	Manager II (520 12)	\$227.58	\$233.27	\$239.10
520 12	Manager I (520 12)	\$221.23	\$226.76	\$232.43
520 12	Sr. Staff III (520 12)	\$195.63	\$200.51	\$205.52
520 12	Sr. Staff II (520 12)	\$189.48	\$194.22	\$199.07
520 12	Sr. Staff I (520 12)	\$185.24	\$189.87	\$194.62
520 12	Jr Staff IV (520 12)	\$157.20	\$161.13	\$165.16
520 12	Jr Staff III (520 12)	\$152.43	\$156.24	\$160.15
520 12	Jr Staff II (520 12)	\$149.25	\$152.98	\$156.81
520 12	Jr Staff I (520 12)	\$125.96	\$129.12	\$132.34
520 13	Partner/Director III (520 13)	\$275.97	\$282.87	\$289.93
520 13	Partner/Director II (520 13)	\$266.76	\$273.43	\$280.26
520 13	Partner/Director I (520 13)	\$262.53	\$269.09	\$275.82
520 13	Sr. Manager III (520 13)	\$255.01	\$261.38	\$267.92
520 13	Sr Manager II (520 13)	\$247.71	\$253.89	\$260.24

SIN	Labor Category Name	Option III Year 3 GSA Price 3-5-15 to 3-4-16	Option III Year 4 GSA Price 3-5-16 to 3-4-17	Option III Year 5 GSA Price 3-5-13 to 3-4-18
520 13	Sr Manager I (520 13)	\$241.35	\$247.39	\$253.57
520 13	Manager III (520 13)	\$234.05	\$239.90	\$245.89
520 13	Manager II (520 13)	\$227.58	\$233.27	\$239.10
520 13	Manager I (520 13)	\$221.23	\$226.76	\$232.43
520 13	Sr. Staff III (520 13)	\$195.63	\$200.51	\$205.52
520 13	Sr. Staff II (520 13)	\$189.48	\$194.22	\$199.07
520 13	Sr. Staff I (520 13)	\$185.24	\$189.87	\$194.62
520 13	Jr Staff IV (520 13)	\$157.20	\$161.13	\$165.16
520 13	Jr Staff III (520 13)	\$152.43	\$156.24	\$160.15
520 13	Jr Staff II (520 13)	\$149.25	\$152.98	\$156.81
520 13	Jr Staff I (520 13)	\$125.96	\$129.12	\$132.34
520 7	Partner/Director III (520 7)	\$217.43	\$222.86	\$228.43
520 7	Partner/Director II (520 7)	\$211.72	\$217.01	\$222.43
520 7	Partner/Director I (520 7)	\$206.41	\$211.57	\$216.86
520 7	Senior Manager III (520 7)	\$200.91	\$205.92	\$211.07
520 7	Senior Manager II (520 7)	\$194.78	\$199.65	\$204.63
520 7	Senior Manager I (520 7)	\$190.54	\$195.30	\$200.19
520 7	Manager III (520 7)	\$184.39	\$189.00	\$193.72
520 7	Manager II (520 7)	\$178.89	\$183.36	\$187.94
520 7	Manager I (520 7)	\$174.65	\$179.02	\$183.50
520 7	Sr. Staff III (520 7)	\$154.13	\$157.98	\$161.93
520 7	Sr. Staff II (520 7)	\$149.25	\$152.98	\$156.81
520 7	Sr. Staff I (520 7)	\$146.09	\$149.73	\$153.48
520 7	Jr Staff IV (520 7)	\$123.84	\$126.94	\$130.12
520 7	Jr Staff III (520 7)	\$119.61	\$122.60	\$125.66
520 7	Jr Staff II (520 7)	\$117.49	\$120.42	\$123.44
520 7	Jr Staff I (520 7)	\$99.51	\$101.99	\$104.54
520 8	Partner/Director III (520 8)	\$217.43	\$222.86	\$228.43
520 8	Partner/Director II (520 8)	\$211.72	\$217.01	\$222.43
520 8	Partner/Director I (520 8)	\$206.41	\$211.57	\$216.86
520 8	Senior Manager III (520 8)	\$200.91	\$205.92	\$211.07
520 8	Senior Manager II (520 8)	\$194.78	\$199.65	\$204.63
520 8	Senior Manager I (520 8)	\$190.54	\$195.30	\$200.19
520 8	Manager III (520 8)	\$184.39	\$189.00	\$193.72
520 8	Manager II (520 8)	\$178.89	\$183.36	\$187.94
520 8	Manager I (520 8)	\$174.65	\$179.02	\$183.50
520 8	Sr. Staff III (520 8)	\$154.13	\$157.98	\$161.93
520 8	Sr. Staff II (520 8)	\$149.25	\$152.98	\$156.81
520 8	Sr. Staff I (520 8)	\$146.09	\$149.73	\$153.48
520 8	Jr Staff IV (520 8)	\$123.84	\$126.94	\$130.12
520 8	Jr Staff III (520 8)	\$119.61	\$122.60	\$125.66
520 8	Jr Staff II (520 8)	\$117.49	\$120.42	\$123.44
520 8	Jr Staff I (520 8)	\$99.51	\$101.99	\$104.54

## INSTRUCTIONS FOR PLACING ORDERS FOR SERVICES BASED ON GSA SCHEDULE HOURLY RATES

GSA provides a streamlined, efficient process for ordering the services you need. GSA has already determined that Deloitte meets the technical requirements and that our prices offered are fair and reasonable. Agencies may use written orders; facsimile orders, credit card orders, blanket purchase agreement orders or individual purchase orders under this contract.

If it is determined that your agency needs an outside source to provide FABS services, follow these simple steps:

### **Step 1. Develop a Statement of Work (SOW)**

- In the SOW, include the following information:
- Work to be performed,
- Location of work,
- Period of performance;
- Deliverable schedule, and
- Special standards and any special requirements, where applicable.

### **Step 2. Select Contractor and Place Order**

- If the order is at or below the micro-purchase threshold, select the contractor best suited for your needs and place the order.
- If the order is exceeding but less than the maximum order threshold (MOT), prepare an RFQ;
- If the order is in excess of the MOT, prepare an RFQ. Consider expansion of competition and seek price reductions.

### **Step 3. Prepare a Request for Quote (RFQ)**

- Include the SOW and evaluation criteria;
- Request fixed price, ceiling price, or, if not possible, labor hour or time and materials order;
- If preferred, request a performance plan from contractors and information on past experience; and include information on the basis for selection.
- May be posted on GSA's electronic RFQ system, e-Buy

### **Step 4. Provide RFQ to at least Three Firms**

### **Step 5. Evaluate Offers, Select Best Value Firm, and Place Order**

## Blanket Purchase Agreement

Ordering activities may establish BPAs under any schedule contract to fill repetitive needs for supplies or services. BPAs may be established with one or more schedule contractors. The number of BPAs to be established is within the discretion of the ordering activity establishing the BPAs and should be based on a strategy that is expected to maximize the effectiveness of the BPA(s). In determining how many BPAs to establish, consider:

- The scope and complexity of the requirement(s);
- The need to periodically compare multiple technical approaches or prices;
- The administrative costs of BPAs; and
- The technical qualifications of the schedule contractor(s).

Establishment of a single BPA, or multiple BPAs, shall be made using the same procedures outlined in 8.405-1 or 8.405-2. BPAs shall address the frequency of ordering, invoicing, discounts, requirements (e.g. estimated quantities, work to be performed), delivery locations, and time.

When establishing multiple BPAs, the ordering activity shall specify the procedures for placing orders under the BPAs.

Establishment of a multi-agency BPA against a Federal Supply Schedule contract is permitted if the multi-agency BPA identifies the participating agencies and their estimated requirements at the time the BPA is established.

Ordering from BPAs:

**Single BPA.** If the ordering activity establishes one BPA, authorized users may place the order directly under the established BPA when the need for the supply or service arises.

**Multiple BPAs.** If the ordering activity establishes multiple BPAs, before placing an order exceeding the micro-purchase threshold, the ordering activity shall:

- Forward the requirement, or statement of work and the evaluation criteria, to an appropriate number of BPA holders, as established in the BPA ordering procedures; and
- Evaluate the responses received, make a best value determination (see 8.404(d)), and place the order with the BPA holder that represents the best value.

**BPAs for hourly rate services.** If the BPA is for hourly rate services, the ordering activity shall develop a statement of work for requirements covered by the BPA. All orders under the BPA shall specify a price for the performance of the tasks identified in the statement of work.

**Duration of BPAs.** BPAs generally should not exceed five years in length, but may do so to meet program requirements. Contractors may be awarded BPAs that extend beyond the current

term of their GSA Schedule contract, so long as there are option periods in their GSA Schedule contract that, if exercised, will cover the BPA's period of performance.

**Review of BPAs:**

The ordering activity that established the BPA shall review it at least once a year to determine whether:

- The schedule contract, upon which the BPA was established, is still in effect;
- The BPA still represents the best value (see 8.404(d)); and
- Estimated quantities/amounts have been exceeded and additional price reductions can be obtained.

The ordering activity shall document the results of its review.

## USA Commitment To Promote Small Business Participation Procurement Programs

### PREAMBLE

Deloitte Consulting LLP provides commercial products and services to ordering activities. We are committed to promoting participation of small, small disadvantaged and women-owned small businesses in our contracts. We pledge to provide opportunities to the small business community through reselling opportunities, mentor-protégé programs, joint ventures, teaming arrangements, and subcontracting.

### COMMITMENT

To actively seek and partner with small businesses.

To identify, qualify, mentor and develop small, small disadvantaged and women-owned small businesses by purchasing from these businesses whenever practical.

To develop and promote company policy initiatives that demonstrates our support for awarding contracts and subcontracts to small business concerns.

To undertake significant efforts to determine the potential of small, small disadvantaged and women-owned small business who will supply products and services to our company.

To insure procurement opportunities are designed to permit the maximum possible participation of small, small disadvantaged and women-owned small businesses.

To attend business opportunity workshops, minority business enterprise seminars, trade fairs, procurement conferences, etc., that will seek to identify and increase small businesses with whom to partner.

To publicize in our marketing publications our interest in meeting small businesses that may be interested in subcontracting opportunities.

We signify our commitment to work in partnership with small, small disadvantaged and women-owned small businesses to promote and increase their participation in ordering activity contracts. To accelerate potential opportunities please contact: Joyce Harris; Phone: 202-378-5448; email:

[jharris@deloitte.com](mailto:jharris@deloitte.com)

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